



William Schories, CIMA, AIF, CRPS

Nationals Sales Director, DCIO

Invesco

New York, New York

Bill Schories is the national sales director of defined contribution for the North America Institutional team. In this role, both he and his team are responsible for driving new business development and relationship management with plan sponsors, consultants and financial advisors. Mr. Schories joined Invesco when the firm combined with OppenheimerFunds in 2019. Joining OppenheimerFunds in 2000, he served as vice president, senior retirement consultant, where he was responsible for defined contribution sales within the New York Metro region. Prior to that, Mr. Schories held positions at Long Term Credit Bank of Japan, Security Pacific and Drexel Burnham Lambert. He is a frequent speaker and thought leader on relevant topics in the retirement industry. Mr. Schories entered the financial services industry in 1988 and has extensive experience in the defined contribution market. Mr. Schories earned a B.S. degree in business management and labor relations from Niagara University. He is a Certified Investment Management Analyst[®] (CIMA), an Accredited Investment Fiduciary[®] (AIF) and a Chartered Retirement Plans Specialist[®] (CRPS) professional. Mr. Schories holds the Series 6, 7, 24 and 63 registrations. In his local community, he serves as a member of the Board of Trustees for CentraState Healthcare System in Freehold, New Jersey.